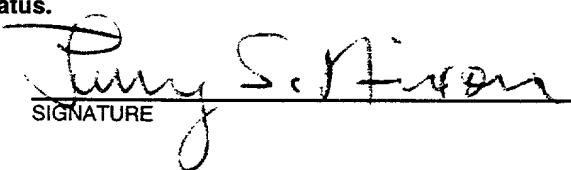


FORM PTO-1390 (REV 11-2000)	U.S. DEPARTMENT OF COMMERCE PATENT AND TRADEMARK OFFICE	ATTORNEY'S DOCKET NUMBER <b>36-1493</b>
TRANSMITTAL LETTER TO THE UNITED STATES DESIGNATED/ELECTED OFFICE (DO/EO/US) CONCERNING A FILING UNDER 35 U.S.C. 371		U.S. APPLICATION NO. (If known, see 37 C.F.R. 1.5) <b>09/914294</b> Unknown
INTERNATIONAL APPLICATION NO. <b>PCT/GB00/01077</b>	INTERNATIONAL FILING DATE <b>22 March 2000</b>	PRIORITY DATE CLAIMED <b>25 March 1999</b>
TITLE OF INVENTION <b>BILL IMAGE GENERATION</b>		
APPLICANT(S) FOR DO/EO/US <b>ANDERSON et al</b>		
<p>Applicant herewith submits to the United States Designated/Elected Office (DO/EO/US) the following items and other information:</p> <ol style="list-style-type: none"> <li><input checked="" type="checkbox"/> This is a <b>FIRST</b> submission of items concerning a filing under 35 U.S.C. 371.</li> <li><input type="checkbox"/> This is a <b>SECOND</b> or <b>SUBSEQUENT</b> submission of items concerning a filing under 35 U.S.C. 371.</li> <li><input checked="" type="checkbox"/> This is an express request to begin national examination procedures (35 U.S.C. 371(f)). The submission must include items (5), (6), (9) and (21) indicated below.</li> <li><input checked="" type="checkbox"/> The U.S. has been elected by the expiration of 19 months from the priority date (Article 31).</li> <li>A copy of the International Application as filed (35 U.S.C. 371(c)(2)).             <ol style="list-style-type: none"> <li><input checked="" type="checkbox"/> is attached hereto (required only if not communicated by the International Bureau).</li> <li><input checked="" type="checkbox"/> has been communicated by the International Bureau.</li> <li><input type="checkbox"/> is not required, as the application was filed in the United States Receiving Office (RO/US).</li> </ol> </li> <li><input type="checkbox"/> An English language translation of the International Application as filed (35 U.S.C. 371(c)(2)).             <ol style="list-style-type: none"> <li><input type="checkbox"/> is attached hereto.</li> <li><input type="checkbox"/> has been previously submitted under 35 U.S.C. 154(d)(4).</li> </ol> </li> <li><input type="checkbox"/> Amendments to the claims of the International Application under PCT Article 19 (35 U.S.C. 371(c)(3))             <ol style="list-style-type: none"> <li><input type="checkbox"/> are attached hereto (required only if not communicated by the International Bureau).</li> <li><input type="checkbox"/> have been communicated by the International Bureau.</li> <li><input type="checkbox"/> have not been made; however, the time limit for making such amendments has <b>NOT</b> expired.</li> <li><input type="checkbox"/> have not been made and will not be made.</li> </ol> </li> <li><input type="checkbox"/> An English language translation of the amendments to the claims under PCT Article 19 (35 U.S.C. 371(c)(3)).</li> <li><input checked="" type="checkbox"/> An oath or declaration of the inventor(s) (35 U.S.C. 371(c)(4)).</li> <li><input type="checkbox"/> A English language translation of the annexes of the International Preliminary Examination Report under PCT Article 36 (35 U.S.C. 371(c)(5)).</li> </ol> <p><b>Items 11 To 20 below concern document(s) or information included:</b></p> <ol style="list-style-type: none"> <li><input type="checkbox"/> An Information Disclosure Statement under 37 C.F.R. 1.97 and 1.98.</li> <li><input checked="" type="checkbox"/> An assignment document for recording. A separate cover sheet in compliance with 37 C.F.R. 3.28 and 3.31 is included.</li> <li><input checked="" type="checkbox"/> A FIRST preliminary amendment.</li> <li><input type="checkbox"/> A SECOND or SUBSEQUENT preliminary amendment.</li> <li><input type="checkbox"/> A substitute specification.</li> <li><input type="checkbox"/> A change of power of attorney and/or address letter.</li> <li><input type="checkbox"/> A computer-readable form of the sequence listing in accordance with PCT Rule 13ter.2 and 35 U.S.C. 1.821-1.825.</li> <li><input type="checkbox"/> A second copy of the published international application under 35 U.S.C. 154(d)(4).</li> <li><input type="checkbox"/> A second copy of the English language translation of the international application under 35 U.S.C. 154(d)(4).</li> <li><input checked="" type="checkbox"/> Other items or information. Copies of Amended Sheets -- pages 32-35, claims 1-22</li> </ol>		

U.S. APPLICATION NO. (If known, see 37 C.F.R. 1.5) <b>09/214294</b>		INTERNATIONAL APPLICATION NO <b>PCT/GB00/01077</b>		ATTORNEY'S DOCKET NUMBER <b>36-1493</b>	
21. <input checked="" type="checkbox"/> The following fees are submitted:				<b>CALCULATIONS</b> PTO USE ONLY	
<b>BASIC NATIONAL FEE (37 C.F.R. 1.492(a)(1)-(5)):</b> -- Neither international preliminary examination fee (37 C.F.R. 1.482) nor international search fee (37 C.F.R. 1.445(a)(2)) paid to USPTO and International Search Report not prepared by the EPO or JPO .....\$1000.00 -- International preliminary examination fee (37 C.F.R. 1.482) not paid to USPTO but International Search Report prepared by the EPO or JPO.....\$860.00 -- International preliminary examination fee (37 C.F.R. 1.482) not paid to USPTO but international search fee (37 C.F.R. 1.445(a)(2)) paid to USPTO .....\$710.00 -- International preliminary examination fee (37 C.F.R. 1.482) paid to USPTO but all claims did not satisfy provisions of PCT Article 33(1)-(4).....\$690.00 -- International preliminary examination fee (37 C.F.R. 1.482) paid to USPTO and all claims satisfied provisions of PCT Article 33(1)-(4).....\$100.00  <div style="text-align: right;"><b>ENTER APPROPRIATE BASIC FEE AMOUNT =</b></div>				<div style="text-align: right;">\$ 860.00</div>	
Surcharge of \$130.00 for furnishing the oath or declaration later than <input type="checkbox"/> 20 <input type="checkbox"/> 30 months from the earliest claimed priority date (37 C.F.R. 1.492(e)).				\$ 0.00	
CLAIMS	NUMBER FILED	NUMBER EXTRA	RATE		
Total Claims	22	-20 =	2	X	\$18.00
Independent Claims	2	-3 =	0	X	\$80.00
MULTIPLE DEPENDENT CLAIMS(S) (if applicable)					\$270.00
<b>TOTAL OF ABOVE CALCULATIONS =</b>					<b>\$ 896.00</b>
<input type="checkbox"/> Applicant claims small entity status. See 37 CFR 1.27. The fees indicated above are reduced by 1/2.					0.00
<b>SUBTOTAL =</b>					<b>\$ 896.00</b>
Processing fee of \$130.00, for furnishing the English Translation later than <input type="checkbox"/> 20 <input type="checkbox"/> 30 months from the earliest claimed priority date (37 C.F.R. 1.492(f)).					0.00
<b>TOTAL NATIONAL FEE =</b>					<b>\$ 896.00</b>
Fee for recording the enclosed assignment (37 C.F.R. 1.21(h)). The assignment must be accompanied by an appropriate cover sheet (37 C.F.R. 3.28, 3.31). <b>\$40.00</b> per property					40.00
Fee for Petition to Revive Unintentionally Abandoned Application (\$1240.00 - Small Entity = \$620.00)					0.00
<b>TOTAL FEES ENCLOSED =</b>					<b>\$ 936.00</b>
				Amount to be:	
				refunded	\$
				Charged	\$
a. <input checked="" type="checkbox"/> A check in the amount of \$936.00 to cover the above fees is enclosed. b. <input type="checkbox"/> Please charge my Deposit Account No. 14-1140 in the amount of \$_____ to cover the above fees. A duplicate copy of this form is enclosed. c. <input checked="" type="checkbox"/> The Commissioner is hereby authorized to charge any additional fees which may be required, or credit any overpayment to Deposit Account No. 14-1140. A duplicate copy of this form is enclosed. d. <input checked="" type="checkbox"/> The entire content of the foreign application(s), referred to in this application is/are hereby incorporated by reference in this application.					
<b>NOTE: Where an appropriate time limit under 37 C.F.R. 1.494 or 1.495 has not been met, a petition to revive (37 C.F.R. 1.137(a) or (b)) must be filed and granted to restore the application to pending status.</b>					
<b>SEND ALL CORRESPONDENCE TO:</b>  NIXON & VANDERHYE P.C. 1100 North Glebe Road, 8 <sup>th</sup> Floor Arlington, Virginia 22201-4714 Telephone: (703) 816-4000					
				 SIGNATURE	
				<b>Larry S. Nixon</b> NAME	
				<b>25,640</b> REGISTRATION NUMBER	
				<b>August 27, 2001</b> Date	

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re Patent Application of

**ANDERSON et al**

Atty. Ref.: **36-1493**

Serial No. **Unknown**

Group:

National Phase of: **PCT/GB00/01077**

International Filing Date: **22 March 2000**

Filed: **August 27, 2001**

Examiner:

For: **BILL IMAGE GENERATION**

\* \* \* \* \*

**August 27, 2001**

Assistant Commissioner for Patents  
Washington, DC 20231

Sir:

**PRELIMINARY AMENDMENT**

Prior to calculation of the filing fee and in order to place the above identified application in better condition for examination, please amend the claims as follows:

**IN THE CLAIMS AS ON AMENDED SHEETS**

Please substitute the following amended claims for corresponding claims previously presented. A copy of the amended claims showing current revisions is attached.

3. (Amended) A method according to claim 1, in which the processing of each usage record includes the step of assigning a unique sort key to the usage record in dependence on its CTI for defining the relative position of the usage record in the bill image.

5. (Amended) A method according to claim 3, in which the sort key is generated in accordance with a set of rules.

6. (Amended) A method according to claim 3, in which the usage records are subsequently sorted according to their respective sort keys to create a sorted list.

11. (Amended) A method according to claim 9, in which each branch between a parent node and a child node in the tree represents text to be inserted in the bill image.

12. (Amended) A method according to claim 1, including the step of generating a bill image record in the bill image for a number of the usage records, the format and content of each bill image record being dependent on the CTI of the respective usage record or usage records.

14. (Amended) A method according to claim 1, in which a number of hidden records are generated in the bill image, the hidden records containing data used to create the bill image.

16. (Amended) A method according to claim 1, further including the steps of generating a time line over at least a part of which a discount scheme applies, dividing the time line into a number of segments each of which corresponds to a period during which a respective version of the discount scheme was operative, accumulating charges from usage records for calls made during each segment, calculating an appropriate discount from each of the accumulated charges, generating a usage record for each discount, and subsequently assigning a CTI to each of the generated usage records to create a number of discount usage records.

18. (Amended) A memory having a data structure stored therein, the data structure defining an electronic bill image having a number of records, each record having an assigned charge type identifier, in which the format of the bill image is dependent on the charge type identifiers of the respective records, the bill image being created in accordance with the method of claim 1.

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**Serial No. Unknown**

19. (Amended) A computer implemented billing system comprising at least one computer readable memory storing computer executable instructions for performing the method of claim 1.

21. (Amended) A system according to claim 19, including a computer readable memory storing a set of rules used to generate a sort key for a usage record.

**REMARKS**

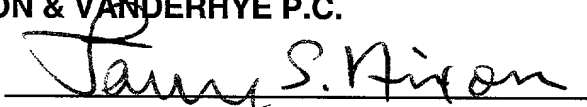
Attached hereto is a marked-up version of the changes made to the claims by the current amendment. The attached page is captioned "**Version with markings to show changes made.**"

The above amendments are made to place the claims in a more traditional format.

Respectfully submitted,

**NIXON & VANDERHYE P.C.**

By:



**Larry S. Nixon**

Reg. No. 25,640

**LSN:Imy**

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**VERSION WITH MARKINGS TO SHOW CHANGES MADE**

3. (Amended) A method according to claim 1 [or 2], in which the processing of each usage record includes the step of assigning a unique sort key to the usage record in dependence on its CTI for defining the relative position of the usage record in the bill image.

5. (Amended) A method according to claim 3 [or 4], in which the sort key is generated in accordance with a set of rules.

6. (Amended) A method according to [any of claims 3 to 5] claim 3, in which the usage records are subsequently sorted according to their respective sort keys to create a sorted list.

11. (Amended) A method according to claim 9 [or 10], in which each branch between a parent node and a child node in the tree represents text to be inserted in the bill image.

12. (Amended) A method according to [any preceding claim] claim 1, including the step of generating a bill image record in the bill image for a number of the usage records, the format and content of each bill image record being dependent on the CTI of the respective usage record or usage records.

14. (Amended) A method according to [any preceding claim] claim 1, in which a number of hidden records are generated in the bill image, the hidden records containing data used to create the bill image.

16. (Amended) A method according to [any preceding claim] claim 1, further including the steps of generating a time line over at least a part of which a discount

scheme applies, dividing the time line into a number of segments each of which corresponds to a period during which a respective version of the discount scheme was operative, accumulating charges from usage records for calls made during each segment, calculating an appropriate discount from each of the accumulated charges, generating a usage record for each discount, and subsequently assigning a CTI to each of the generated usage records to create a number of discount usage records.

18. (Amended) A memory having a data structure stored therein, the data structure defining an electronic bill image having a number of records, each record having an assigned charge type identifier, in which the format of the bill image is dependent on the charge type identifiers of the respective records, the bill image being created in accordance with the method of [any of claims 1 to 15] claim 1.

19. (Amended) A computer implemented billing system comprising at least one computer readable memory storing computer executable instructions for performing the method of [a selected one of claims 1 to 17] claim 1.

21. (Amended) A system according to claim 19 [or 20], including a computer readable memory storing a set of rules used to generate a sort key for a usage record.

**BILL IMAGE GENERATION**

11/pst

**Field of the Invention**

The present invention relates to a method of generating a bill image and also to a computer-  
5 implemented billing system.

**Background to the Invention**

As telecommunications technologies advance, the number of service types available to the  
customer from telecommunications suppliers is increasing dramatically. A private customer  
10 may have a standard telephone line, a cardphone account and possibly access to network  
facilities such as call minding and 3-way calling, all of which may have to be billed to a  
single account. A business customer may have many more services such as ISDN,  
permanent leased data connections, or multiple lines connected to a single number. Each  
service type to be charged needs to be clearly and logically laid out on the printed bill so that  
15 the customer can easily determine what he is being charged for.

A number of different discounting products or schemes may need to be supported. These  
may be introduced as promotions to all or selected customers, sold as a product to a customer  
or subject to the customer requesting to join the scheme. Examples of discounting products  
20 marketed by British Telecommunications public limited company include discounted  
Saturday calls, PremierLine and Friends & Family. A further discounting product offered,  
particularly to business users, is volume threshold discounting.

With the deregulation of the telecommunications industry and subsequent competition it has  
25 brought a large number of charging systems, discounting options and other offers to attract



customers and compete with other telecommunications suppliers has introduced the need for further levels of detail in bills so the customer can readily appreciate the savings made.

Typically, one of the problems in introducing new products is the time taken to implement appropriate changes to the computer software used to process customer usage records to generate bills. A new service type to be billed, an alteration to the format or ordering of a bill, or any other similar amendment requires program code to be updated or otherwise re-written, sometimes at great expense. It is desirable to provide a more flexible bill processing system.

US-A-5884284 discloses an integrated telecommunications user account management system to create, maintain and analyse individual telecommunications user account information. Although the specification is quite long and detailed, rather little is said about the generation of bills. When a subscriber is to be billed, the database for that subscriber is accessed to obtain data on current unbilled usage, historical data (such as balances forwarded and recent payments yet to be credited) and any other information to be included on the bill (such as announcements and advertising). A bill is then prepared for that subscriber in the standard format. The bill image is then sent to a printing house where they are printed, enveloped and posted to the subscriber. Then the system is updated accordingly (particularly regarding indications of what has been billed and is now an account receivable). There is no mention of assigning charge type identifiers nor of processing usage records in dependence upon charge type identifiers. As such, this publication is only of relevance as technological background.

WO-A-9849825 describes a method of processing "call detailed records" (CDRs) which are used in the generation of bills. In the method, a graphical user interface is used to enable a user to select the data fields which are to be used to provide the data from which a bill is to be produced. Only such data as corresponds to the fields which have been selected will pass from the home telephone exchange to the billing centre. There is no reference to charge type identifiers, nor to the editing of bill images. Rather, the invention seems to be addressing problems of excess data (including blank fields) in a variety of formats being passed between telephone exchanges and billing centres; difficulties of adding or removing fields from CDRs; and the need for the suppliers of telephone exchange equipment to be notified as much as a year before installation of a telephone exchange of the format/field names, etc. which are to be used in the CDRs. Thus it can be seen that the invention there set out is addressing a very different problem from the one addressed by the present invention.

US-A-5218632 concerns a telecommunications billing record software system which permits the company operating a telephone exchange to interface with and define the criteria for constructing and/or modifying the decision tables used to decide whether or not to generate a billing record for each particular call. In addition, the company can also define the criteria for specifying the billing record data to be included within the billing records which are generated and the location to which the record is output. Thus the invention described in '632 is in effect concerned with a method of configuring a telephone exchange to capture data of the desired type for use in billing, the invention providing a means for an operating company to change, at will, what items will be charged for. The disclosure is not concerned with the use of charge type identifiers nor with the processing of usage records in dependence upon charge type identifiers.

In the paper "A graphical tool for bill design", BT Technology Journal, Vol 12, No 4, pp 85-91, 1994, Utton & Saunders, there is described a tool to support the design of telephone bills.

The tool allows a bill designer to modify the layout of a bill graphically, using a graphical user interface, and to receive feedback from a knowledge base embodying typographical guidelines and operational system constraints. In this way, the tool is able to provide decision support for the bill design process. The tool is also able to generate the formatting parameters requires by the operational systems to implement revised bill designs.

Using the graphical user interface, a designer is able to edit an image of a bill. There is, however, no disclosure of using charge type identifiers.

The paper "Multiservice billing system – a platform for the future", BT Technology Journal, Vol 14, No 3, pp 98-113, 1996, J Crookes gives an extensive overview of the complexities inherent in billing systems for a major telecommunications provider. It does not mention the use of charge type identifiers.

### **Summary of the Invention**

According to a first aspect of the present invention, a method of generating a bill image in a computer implemented billing system comprises the steps of assigning a charge type identifier (CTI) to each of a number of usage records and processing each usage record in dependence on its assigned CTI to produce a bill image. The format of the bill image being dependent on the CTI of the usage records.

Preferably, a CTI is assigned to each usage record in accordance with a set of rules.

Preferably, the processing of each usage record includes the step of assigning a unique sort key to the usage record in dependence on its CTI for defining the relative position of the usage record in the bill image.

5

Preferably, the sort key is generated in dependence on the CTI and a number of fields associated with the usage record.

Preferably, the sort key is generated in accordance with a set of rules.

10

Preferably, the usage records are subsequently sorted according to their respective sort keys to create a sorted list. More preferably, the sorted list is processed to generate, when appropriate, and in dependence on the CTIs of the usage records, a number of text inserts to precede or follow a usage record or group of usage records in the bill image.

15

Preferably, each CTI is associated with a position in a text map, in which a change in position in the text map triggers the generation of a text insert, and in which generating the text inserts comprises the steps of determining the text map position for a usage records CTI, comparing the position with that determined for the previous usage record, and inserting an appropriate text insert if a change in position in the text map occurs. More preferably, the text map is a tree hierarchically defining the order in which text inserts are to appear in the bill image. Most preferably, the text map position for each CTI is a leaf node in the tree.

20

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Preferably, each branch between a parent node and a child node in the tree represents text to be inserted in the bill image.

Preferably, the method includes the step of generating a bill image record in the bill image  
5 for a number of the usage records, the format and content of each bill image record being dependent on the CTI of the respective usage record or usage records. Preferably, a bill image record is generated for a plurality of usage records having a common CTI.

Preferably, a number of hidden records are generated in the bill image, the hidden records  
10 containing data used to create the bill image. More preferably, the data contained in the hidden records enables the disassembly, modification and reassembly of the bill image to create a fresh bill image.

Preferably, the method further comprises the steps of generating a time line over at least a  
15 part of which a discount scheme applies, dividing the time line into a number of segments each of which corresponds to a period during which a respective version of the discount scheme is operative, accumulating charges from usage records for calls made during each segment, calculating an appropriate discount from each of the accumulated charges, generating a usage record for each discount, and subsequently assigning a CTI to each of the  
20 generated usage records to create a number of discount usage records.

Preferably, called usage records are accumulated by call type, the call type being obtained for the call usage records from a mapping of CTI to call type.

According to a second aspect of the present invention, a memory comprises a data structure stored in the memory defining an electronic bill image having a number of records, each record having an assigned charge type identifier, in which the format of the bill image is dependent on the charge type identifiers of the respective records.

5

Preferably, the bill image is created in accordance with the method of the first aspect of the present invention.

According to a third aspect of the present invention, a computer implemented billing system  
10 comprises at least one computer readable memory storing computer executable instructions for performing the method of the first aspect of the present invention.

Preferably, the system comprises a computer readable memory storing a set of rules used to assign a CTI to a usage records.

15

Preferably, the system comprises a computer readable memory storing a set of rules used to generate a sort key for a usage record.

According to a fourth aspect of the present invention, a computer implemented billing system  
20 is arranged to perform the following operations:

assign a charge type identifier (CTI) to each of a number of usage records; and,  
process each usage record in dependence on its assigned CTI to produce a bill image, the format of the bill image being dependent on the CTIs of the usage records.

The present invention provides a data driven bill processing system which readily permits alterations to the format or ordering of a bill without requiring substantial modification to the program code used to generate a bill image.

## 5 **Brief Description of the Drawings**

Examples of the present invention will now be described in detail with reference to the accompanying drawings, in which:

Figure 1 is a functional block diagram of an example of an exchange forming part of a telecommunications network and bill generation system in accordance with the present invention;

Figure 2 is a tree showing the processing flow of the bill generation system of Figure 1;

Figure 3 is the tree of Figure 2 highlighting processes of the bill generation system specific to the assembly of a bill;

Figure 4 is a portion of a text map used in the bill generation system in accordance with the present invention;

Figures 5a to 5e illustrate the steps in generating a bill image from a set of usage records using the text map of Figure 4;

Figure 6 is a flow chart showing the processes of the bill generation system specific to applying discounts and the like;

Figure 7a and b illustrate time lines generated for applying discounts to usage records;

Figure 8 is a flow chart of processes performed in disassembling and editing an existing bill image in accordance with the present invention; and,

Figure 9 is the tree of Figure 2 highlighting processes of the bill generation system used in reassembling bill images.

### Detailed Description

In a telecommunications network, a service provider normally bills its customers on a regular monthly or quarterly basis. In the system shown in Figure 1, for each call or use of a chargeable service made by a customer a usage record is produced in a telecommunications exchange 10. The usage records are transmitted, in batches, to a pricing system 20. Each usage record is priced according to the provider's current scale of charges and stored in a data store 30 in a file associated with the customer. At a predetermined billing date, the contents of the customer's file in the database 30 are processed by a bill processing system 40. The billing system processes each usage record in sequence to determine which service type it relates to, for example long distance, chargecard calls or operator services, and the records are then sorted into groups according to service type and fed into a bill generator 60. The bill generator outputs each group of sorted records and any necessary headers and footers for that service as an electronic bill image 50. The bill generator 60 has an ordered list of service types which corresponds to the order into which the records are pre-grouped. Each element in the list is associated with text headers and footers that will appear on the printed bill. For each group of sorted records, the bill generator 60 compares the service type of the records to that which it is expecting in its list. If these match then the associated headers and footers are outputted. Otherwise the bill generator 60 moves onto the next service in its list.

In order to accommodate variable charging, discounting and other such offers, the system shown in Figure 1 is arranged so that in addition to sorting the usage records according to service type, they are also processed by a discounting engine 70 which sorts the usage



records into groups according to service type and also according to whether they qualify for discounts. A discount is calculated from those records that qualify which is then applied to the charge produced by the bill processing system 40.

- 5 In Figure 1, the pricing system 20 may be implemented by one computer, whilst the bill processing system 40, bill generator 60, and the discounting engine 70 may be implemented by another computer. Each computer is of a well known construction and comprises a central processing unit, a store in the form of a random access memory, a read only memory and a hard disk, a visual display unit, a keyboard and input and output ports. The programs  
10 for controlling the operation of the computer are held in the store.

Figure 2 is a tree showing an example of the information processing flow of a bill generation system in accordance with the present invention. The tree should be read from top to bottom and left to right. An asterisk (\*) in a block indicates that the process of the block is repeated a  
15 number of times.

In the same manner as the system described above with reference to Figure 1, each call or use of a chargeable service made by a customer generates a usage record which is priced and stored in a data store in a file associated with the customer. At the predetermined billing date,  
20 the bill generation system is run. Initialisation processes 100 and 110 are performed to respectively initialise discounting modules of the system and load from an external database a series of data processing rules and tables used by the system.

In process 120, an account processor prepares a bill for each customer to be billed on that date. In process 130, a number of time lines are created for use in determining any discounts from discounting products which are applicable to the customer over the period to be billed. A number of accumulators are also created and associated with the time lines for summing charges for subsequent use in calculating discounts. Each accumulator may relate to a chargeable service type such as direct-dialled calls. For each customer installation the records stored in the data store 30 associated with the customer are processed firstly by customer telephone line and then by usage record in process 140. For each usage record, billing details are assembled and stored in process 150 by assigning a charge type identifier (CTI) to the usage record in process 160. As part of the bill assembly, a running total of charges for those records processed is kept in process 170, in addition to accumulating the charges in the accumulators created in process 130. A sort key is assigned to the usage record which is then stored in an unsorted bill details (UBD) database in process 180.

15 A discounting engine processes the filled accumulators in process 190 to determine, according to the discounting products initialised in process 130, whether any discounts should be given. Each discounting product applicable to the customer may generate one or more discount records which are also passed to processes 150 to 180 to have a CTI and sort key assigned and to be added to the UBD.

20

Once all the usage records have been processed and applicable discounts have been determined, the bill assembly control process 200 is called. This produces a bill summary according to the summed call charges less any applicable discounts in process 210. In process 220 the UBD are sorted using the assigned sort keys to produce a list of sorted bill

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- details which is stored in a sorted bill details (SBD) database. The SBD is then passed to a bill generator 60 which parses the SBD and generates an electronic bill image containing the records of the SBD and any other appropriate information that should appear on the bill. A bill image is a representation of a bill and is stored in a database from which the bill can be
- 5 printed. For each subset of records of the SBD, such as international direct dialled calls, a breakdown listing and/or a total charge in addition to explanatory text in the form of headers and/or footers for that subset is produced by processes 230 and 250 and added to the bill image in the appropriate position. The bill summary generated by process 210 is added to the bill image in process 260. Finally, a number of hidden records are added to the bill image by
- 10 processes 270 and 280 enabling a user of the system to regenerate discounting time lines, accounting details and other data specific to the customer at the date the bill image was created without reference to any other data. Process 300 then prints the bill image to be sent out to the customer.
- 15 Figure 3 is the tree of Figure 2 highlighting processes of the bill generation system specific to the assembly of a bill.

An example of a group of usage records which are passed to process 150 is shown below (the name of the fields are shown for clarity):

MAINLINE-ID	Descriptor	COST OF CALL	DEST NO.	DATE OF CALL	TIME OF CALL	CALL LENGTH	NET-SV-ID
01232123456	DD local call	1.352	0123220143	19980101	120000	01132300	0123294364
01232123456	DD local call	0.400	0123221123	19980101	120500	00014300	0123294364
01232223456	DD local call	0.199	0123221123	19980102	120500	00020000	0123294364
01232123456	DD local call	1.352	0123220143	19980102	120000	01132300	0123294364
01232123456	DD local call	0.400	0123221123	19980102	120500	00014300	0123294364
01232123456	DD local call	1.352	0123220143	19980101	120000	01132300	0123294365
01232123456	DD local call	1.352	0123220143	19980102	120000	01132300	0123294365
01232123456	DD local call	0.400	0123221123	19980102	120500	00014300	0123294365
01232123456	DD regional call	1.352	0176271122	19980101	120000	01132300	0123294364
01232123456	DD international call	0.500	03993234234	19980101	120000	00113300	0123294364
01232123456	DD local call	0.400	0123221123	19980101	120500	00014300	0123294365
01232123456	DD international call	1.052	04212124732	19980101	120500	01132300	0123294364
01232223456	DD local call	0.16	0123220143	19980101	120000	00025900	0123294364
01232223456	DD local call	1.065	0123221123	19980101	120500	00015600	0123294364
01232123456	DD regional call	0.300	012471982	19980101	120500	00014300	0123294364
01232223456	DD local call	16.06	0123220143	19980102	120000	00020000	0123294364

The MAINLINE-ID field contains the telephone line number to which the call should be assigned for charging whilst the NET-SV-ID contains the number from which the call was made. The abbreviation DD stands for “direct dialled”.

5

A set of rules loaded in process 110 from the external database are used in process 160 to determine which of the set of CTIs should be assigned to each respective usage record. The rules associate the usage records with CTIs such that an assigned CTI uniquely identifies the type of the usage record. Some examples of CTIs are shown below:

Charge type	CTI
Friends & Family service charge	34
Direct dialled local call itemised	35
Direct dialled regional call itemised	36
Direct dialled national call itemised	37
Direct dialled international call itemised	38
Direct dialled other call itemised	39
Call diversion local facility fee	46
Ring back when free national facility fee	56
Call diversion-local call	71
Ring back when free – national	83
Operator call local	102

Operator call international	104
Chargecard call international	105
Chargecard call local	106
Chargecard call national	107

Each usage record is processed in turn using data from, in particular, the DEST No (number called) field and NET-SV-ID field. Non-telephone call usage records are processed using other fields (not shown in the above example). Starting at rule 1 below, the type of charge is identified using the Descriptor field of the record. For each permitted answer, there is an associated output from the rule. The output consists of an element of a charge identifier and a next action in the form of the next rule to be parsed or a command to exit as processing has either been completed or an exception has been raised. In parsing the rules for the first record shown above, rule 1 determines that the record relates to a direct dialled call and outputs a 1 before proceeding to parse rule 2. It is determined that the call was not made using a cardphone and a 2 is output and rule 3 is parsed. According to the customer's requirements and default system settings, this type of charge may be bulked, that is individually itemised on the customer's bill, and a 2 is output, continuing on to parse rule 4. Again, customer requirements and default settings indicate that itemisation may be required for this type of charge and a 1 is output and rule 5 is parsed. Comparing the contents of the COST OF CALL field to the itemisation threshold stored in a database associated with the customer, it is determined that the cost of the call is greater than the threshold and a 1 is output, proceeding to parse rule 6. It is determined that the charge does not relate to an international call, a 2 is output and rule 7 is parsed. In rule 7, the call distance is determined to be local, a 1 is output and the system exits parsing for this record.

Rule	Permitted Answers	Output from Rule
(1) What type of call is it	Direct dialled Network Service (NS) facility fee NS call NS fee non-call Other	1 – go to rule 2 2 – go to rule 8  3 – go to rule 8 4 – go to rule 11 STOP BILL RUN
(2) Is this a cardphone call	Cardphone Other	1 – go to rule 3 2 – go to rule 3
(3) Is bulking required	No Possibly	1 – go to rule 6 2 – go to rule 4
(4) Is itemisation required	Possibly No	1 – go to rule 5 2 – go to rule 6
(5) Is the call cost greater than the itemisation threshold	Yes No	1 – go to rule 6 2 – go to rule 6
(6) Is this an international call	Yes Other	1 – go to exit 2 – go to rule 7
(7) What is the call distance	Local Regional National Other	1 – go to exit 2 – go to exit 3 – go to exit 4 – go to exit
(8) Is this an international call	Yes Other	1 – go to rule 10 2 – go to rule 9
(9) What is the call distance	Local Regional National Other	1 – go to rule 10 2 – go to rule 10 3 – go to rule 10 4 – go to rule 10
(10) What is the network service type	Charge advice Call diversion 3 way call Ring back when free	1 – go to exit 2 – go to exit 3 – go to exit 4 – go to exit 5 – go to exit
(11) What is the network service type	Call return Call trace Reminder call Call diversion Ring back when free Other	1 – go to exit 2 – go to exit 3 – go to exit 4 – go to exit 5 – go to exit 6 – go to exit

In the above example, the value 1221121 is output from the rule parsing. This is cross referenced with the table below to give a CTI of 35.

Charge type	Output from rules	CTI
DD local calls itemised	12121 1221121	0035
DD regional calls itemised	12122 1221122	0036
DD national calls itemised	12123 1221123	0037
DD international calls itemised	1211 122111	0038
DD other calls itemised	12124 1221124	0039
Call diversion call local facility fee	2212	0046
Call diversion call national facility fee	2232	0056
Call diversion call local	3212	0071
Ring back when free call national	3234	0083

As each usage record is processed in process 170, the total charge to the customer is accumulated.

5

In process 180, a sort key for each usage record is generated according to the following criteria:

- sort section key      - overall ordering within the bill based on the record's CTI
- mainline key        - the telephone number to be processed
- 10    sort subsection key    - ordering within a subsection of a bill based on the record's CTI
- calling line ID        - the telephone number from which the call was made
- call date             - the date on which the call was made
- call time             - the time at which the call was made

15    These criteria form part of the rules loaded in process 110.

For example, the above usage records would be respectively assigned the following sort keys:

( sort section | main line | sort subs | calling line | date | time)

5	3		01232123456		18		0123294364		19980101		1200
	3		01232123456		18		0123294364		19980101		1205
	3		01232123456		18		0123294364		19980102		1200
	3		01232223456		18		0123294364		19980102		1205
	3		01232123456		18		0123294364		19980102		1205
10	3		01232123456		18		0123294365		19980101		1200
	3		01232123456		18		0123294365		19980101		1205
	3		01232123456		18		0123294365		19980102		1205
	3		01232123456		20		0123294364		19980101		1200
	3		01232123456		22		0123294364		19980101		1200
15	3		01232123456		18		0123294365		19980102		1200
	3		01232123456		22		0123294364		19980101		1205
	3		01232223546		18		0123294364		19980101		1200
	3		01232223456		18		0123294364		19980101		1205
	3		01232123456		20		0123294364		19980101		1205
20	3		01232223456		18		0123294364		19980102		1200

Each usage record and its assigned CTI and sort key is stored in the UBD. Some usage records, for example for chargecard calls, may take much longer to reach the service provider than those for a local call and could therefore be out of time order sequence. The usage record may even be from a previous billing period.

Process 210 generates a bill summary for the customer. The summary contains the customer account number and address for billing as well as the total charges accumulated in process 170 less any applicable discounts.

In process 220 the UBD are sorted numerically by the assigned sort keys to produce a sorted bill details (SBD) which are stored in a SBD database. The SBD are parsed in processes 230 and 250 to generate an electronic bill image containing the records to be printed from the SBD, formatting codes relating to how lines of the bill should be printed and text codes



indicating other information that should appear on the bill. These processes are described in more detail with reference to Figure 4. Process 260 takes the bill summary produced in process 210 and adds it to the electronic bill image.

Processes 270 and 280 add the records from the SBD and other customer data to the electronic bill image that, whilst not printed on the bill, would be needed for reference in determining how the bill was generated or when amending the bill. Non-itemised usage records are assigned a different CTI to itemised usage records which results in them not being individually displayed on the bill. Process 270 passes each hidden record of the SBD to process 280 which adds it to the electronic bill image on a hidden page which is not printed by process 300. Other types of hidden records added here are discussed in further detail with reference to Figure 6.

The electronic bill image is then passed to process 300 for printing and dispatch to the customer.

Process 300 reads each line of the bill image and, using data tables loaded in process 110, converts the records and codes into lines of formatted text and places it into a print file. The data tables contain details on the font, text size and format of a line according to its CTI. The data tables also contain cross references from text codes to textual description lines to be added to, around, before, or after a bill image line.

For example, a bill image record may be of the form:

CTI 34 | £2.00 | TextCode00123

Process 300 retrieves the text relating to code 00123 ("You have chosen to opt for Friends & Family and you will be charged <VAL> per month"), the format relating to CTI 34 (Times New Roman 10 italics bold) and output the following to the print file:

*You have chosen to opt for Friends & Family and you will be charged £2.00 per month*

The entries in the data tables for hidden records, the hidden attribute being specified by their respective CTI, instruct process 300 to ignore these records.

Once each line of the bill image has been processed, the print file is sent to a printer to be output. An example of a print file to be output is shown below:

#### Regional & national calls

##### Regional & national calls over £0.50 (itemised)

Line number 894100

<i>Date</i>	<i>Time</i>	<i>Destination</i>		<i>Duration</i> (hrs:mins:secs)	<i>Cost before discount</i> (£)
3 Nov	10:30	Ipswich	01473 320143	01:13:23	1.352
10 Nov	11:36	Ipswich	01473 321123	!SAVER!! 00:01:43	0.563
Subtotal for line 894100				01:15:06	1.915

Line number 894425

<i>Date</i>	<i>Time</i>	<i>Destination</i>		<i>Duration</i> (hrs:mins:secs)	<i>Cost before discount</i> (£)
11 Nov	10:30	Ipswich	01473 320143	01:13:23	1.352
Subtotal for line 894425				01:13:23	1.352
Total regional & national calls over £0.50 (itemised)				02:28:29	3.267

	<i>Number of calls</i>	<i>Duration</i> (hrs:mins:secs)	<i>Cost before discount</i> (£)
Total regional & national calls	152	03:01:59	18.968

#### International calls

##### International calls over £0.50 (itemised)

Line number 894100

<i>Date</i>	<i>Time</i>	<i>Destination</i>		<i>Duration</i> (hrs:mins:secs)	<i>Cost before discount</i> (£)
3 Nov	10:30	France	33345434436	!SAVER!! 00:06:23	1.352
3 Nov	11:36	USA	12124523445	USAPLAN 00:03:43	0.563
Subtotal for line 894100				00:10:06	1.915

Line number 894425

<i>Date</i>	<i>Time</i>	<i>Destination</i>		<i>Duration</i> (hrs:mins:secs)	<i>Cost before discount</i> (£)
11 Nov	10:30	France	33342320143	01:13:23	1.352
16 Nov	11:36	USA	13122346532	!SAVER!! 00:01:43	0.563
Subtotal for line 894425				01:15:06	1.915

	<i>Number of calls</i>	<i>Duration</i> (hrs:mins:secs)	<i>Cost before discount</i> (£)
Total international calls over £0.50 (itemised)		01:25:12	3.830

094425 03270 10280 1524660

Figure 4 depicts a portion of a tree of a text map used in the generation and formatting of an electronic bill image. The tree defines the relationships between sections of the bill, such that each node of the tree represents a section. The hierarchy of the tree is such that lower level nodes represent subsections of higher level nodes. Each CTI is mapped to a leaf node in the tree. CTI mappings shown in Figure 4 are expressed in the form CTI-XXX, where XXX is the CTI number.

The following structure is populated for each usage record processed:

```

10  CURRENT USAGE RECORD
      CTI
      HEADING ARRAY
      CURRENT SECTION ID
      TRIGGER VARIABLES ARRAY
15

```

For each usage record, its immediate heading is obtained by following the mapping of the usage record's assigned CTI to a leaf node which defines the heading for that CTI type. The identifier of that heading is written to the first element of the heading array. From this leaf node, the heading identifier of the parent section is obtained by following the branch of the leaf node up one level in the tree. This is stored in the second element of the array, and so on up the tree until the root is reached.

In one example, an SBD having usage records with respective CTIs of 35, 35, 37 and 56 is passed to process 250. CTI 35 is mapped to leaf 412 in the tree. Following the branch up the tree and recording the identifiers of each node passed, the first and second records generate a heading branch array of [400 410 411 412]. In a similar manner, the third record generates a heading branch array of [400 410 414 415] and the last record generates a heading branch array of [400 430 435 436].

For each CTI, one or more trigger variables may also be stored, each variable can trigger the output of a section header at any one of the heading identifiers in the heading array structure.

A change of value of trigger variable causes new section information to be written to the electronic bill image for that section. A trigger variable may be, for example, a change in the telephone line to be displayed. If a bill is to be generated for 2 or more telephone lines, each may have usage records for direct dialled local calls (each record will have the same CTI) and these may be outputted to the bill image in the same section. However, the CTI for direct dialled local calls may have a trigger variable of change in line, in which case when the line identifier changes, a header and possibly a footer may be outputted to the current section of the electronic bill image to differentiate between charges from the different lines. Trigger variables are obtained from a trigger table loaded by the system in process 110 and stored in the trigger variable array.

Once the arrays have been determined, process 250 determines whether any header or footer information in the form of text codes need to be output. Firstly, the heading identifier for the first entry in each of the current and previous charge structures is compared. If these values are the same, the corresponding trigger variables stored against those heading identifiers are compared. This is repeated for each heading identifier value and trigger variable until a change is noticed, at which point the level of change is recorded. If no change occurs, then no change in header information is required and the usage record can be output to the bill image directly.

Once a change is detected at a certain heading level, the footers belonging to the previous charge down to and including the change point given by the previous section are output to the bill. This is then followed by the headers belonging to the current charge up from and including the changed level.

5

An example of the processing of the above arrays for generating an electronic bill image is illustrated schematically in Figures 5a to 5e.

The electronic bill image illustrated in Figure 5a is generated by processing the first record and its corresponding array. Headers opening respective sections 400, 410, 411 and 412 are output, followed by the first record 550. As the array of the first and second records do not differ, on processing the second record and its array, only the second record 560 is output to the electronic bill image as is illustrated in Figure 5b.

In processing the third record, its corresponding array differs at the third and fourth element [400 410 414 415]. This difference causes sections 411 and 412 to be closed by outputting footers before headers opening respective sections 414 and 415 are output. The third record 570 is then output to the electronic bill image, as illustrated in Figure 5c.

The array corresponding to the last record differs from the previous record at the second element [400 430 435 436]. This difference causes sections 410, 414 and 415 to be closed by outputting footers prior to headers opening respective sections 430, 435 and 436 being output. The last record 580 is then output to the electronic bill image, as illustrated in Figure 5d. As there are no more records to process, the remaining open sections 400, 430, 435 and

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436 are closed by outputting footers completing generation of the bill image, as illustrated in Figure 5e.

In the above process, the heading arrays need not be generated all at once and could be generated one at a time as the electronic bill image is being created as long as a copy of the previous header array was retained for use in determining differences in heading sections.

In the example described above the term "usage record" is applied to call records. However, the invention may be applied to other forms of usage records relevant to, for example, discounting products (see below), and rental charges for equipment or other facilities.

Figure 6 is a flow chart in which processes 100, 130, 170 and 190 of the bill generation system specific to applying discounts and the like are described in further detail.

Each discounting product will have one or more qualification criteria defined. For example, for PremierLine provided by British Telecommunications plc most call charges qualify for a discount (charges for calls to mobile telephones or premium rate numbers are normally excluded), whilst for Friends & Family provided by British Telecommunications plc, only call charges on calls to a group of selected numbers qualify for a discount. The qualification criteria for each discounting product are loaded into the system in step 600 from an external data store (process 100). A CTI to call type mapping is also loaded from an external data store in step 600.

In order to allow discounting products to be applicable for only a part of a billing period, discounting products subscribed to by the customer and the dates on which they were active during the billing period are stored in a customer account database.

- 5 When first starting to process a customers account, the customer account database is accessed and the discounting products subscribed to, and the dates on which they were active for the customer, are obtained in step 610 (process 130).

- 10 If a customer is a member of Friends & Family, the customer's selected set of numbers are obtained from the customer account database and are added to the qualification criteria for the Friends & Family discounting product.

- 15 Using the data from the customer account database, a time line for each discounting product subscribed to is generated in step 620. A timeline consists of one or more segments, each segment representing a period in which the discounting product was active and unchanged, i.e. the discount rate or circumstances in which discounts apply do not change. Each segment has a number of accumulators for storing charges of usage records that qualify for the discounting product during the time period of the segment.

- 20 The structure of each segment of a time line is dependent on the discounting product. For Friends & Family, each segment has an accumulator for each number from the customer's selected group, whilst for the other products each segment has a number of accumulators, one for each of a fixed number of call types, in which details of any qualifying usage record

for that segment are stored. The accumulators are created in process 130, as previously discussed with reference to Figure 2.

Figure 7a illustrates an example of a time line generated for a discounting product in which a customer subscribes to the product part way through a billing period and a number of changes to the product are also made. Prior to obtaining data on the discounting product, the dates of the usage records in the UBD are checked to determine whether any record is from a previous billing period. If so, the billing period, for the purposes of generating time lines is extended to incorporate the date(s) of these records. The customer account database is accessed and the period(s) of the billing period during which the product was actually subscribed to are determined. A central discount product definition database is also accessed that contains data defining the product. Any changes made to the product during the billing period are obtained. A time line data structure 700 is generated consisting of one or more segment data structures 710-740. The time line data structure 700 is preferably formed as a linked list of segments, each segment representing a part of the billing period during which the discounting product was subscribed to by the customer and during which the product was not changed. A number of accumulator data structures, each represented by a single data store 760-790, are linked to each segment data structure. In the example of Figure 7a, the customer subscribes to the product at point P1 generating segment 710, the discount rate applicable to the discounting product is changed at point P2 generating segment 720, the customer changes options of the discounting product at point P3 generating segment 730, the customer cancels the subscription to the product at point P4 and resubscribes at point P5 generating segment 740.



Referring to Figure 6, as each usage record is processed, a call type for each usage record is determined in step 630 by cross-referencing its CTI with the table mapping CTI to call type loaded into the system in process 100 from an external data store. There may be a number of CTIs mapped to a single call type, for example the CTIs for local, regional, national and international direct dialled calls may be mapped to the call type direct dialled calls. The table also contains a flag for each call type indicating whether a call type for the destination number of the usage record should be determined. If the flag is set then step 630 also determines a call type for the destination number of the usage record.

- 10 In step 640, for each discounting product in which each segment has a number of accumulators, one for each call type, the date and time the call was made or the service type used is checked against the segments of the time line. If the date and time falls within one of the segments, the charge of the usage record is added to the appropriate accumulator for that segment in step 650. For a discounting product such as Friends & Family each segment is
- 15 divided into the numbers selected for Friends & Family, each of which will have an accumulator. In the step 660, the usage record is checked to determine if the call charge qualifies for a Friends & Family discount. If the number to which the call is made is one of the Friends & Family group, the call charge is added to the appropriate accumulator in step 670. Depending on the discounting products that are applicable to the customer, a call
- 20 charge may be added to a number of accumulators each associated with different products. Steps 630 to 670 occur in process 170, described with reference to Figure 2.

Figure 7b expands on the example of Figure 7a illustrating a number of usage records that qualify for the discounting product, the usage records having respective dates D1-D5. Date

D1 occurs prior to the start of the billing period and the time line for the billing period is therefore artificially expanded to include this date according to data in the customer account database and the discounting product definition database. From the data it is determined that the customer had subscribed to the discounting product during the period of date D1 resulting  
5 in segment 750 and linked accumulator data structure 800 being generated.

The date of each usage record is compared with the time line data structure and if the date coincides with the period of one of the segments, the charge held in the usage record is added to the accumulator linked to that segment. In this example, the date D1 coincides with the  
10 period of segment 750 and the charge of the associated record is added to accumulator 800, and so on. The date D4 does not coincide with the period of any segment and therefore that usage record is not applicable for a discount from the discounting product and is ignored.

Referring again to Figure 6, after all the usage records have been processed discounts are  
15 calculated from the accumulated charges. For all discounting products other than Friends & Family, this is calculated by determining the call types that qualify for the discount product and applying the correct discount rate to the sum stored in each accumulator of qualifying call types in step 680. For Friends & Family, the amount of discount is determined in step 680 by applying the discount rate associated with each of the customer's selected destination  
20 numbers to the accumulated usage. For each discount calculated, a discount record is generated in step 690 in which the discount and any other details necessary to be displayed to the customer on their bill are stored. Steps 680 to 690 occur in process 190, described with reference to Figure 2.

Each discount record generated is then passed to process 150 to have a CTI and sort key assigned and to be added to the UBD. Process 170 is skipped when process 150 is called from process 190.

- 5 An example of a number of discount records passed to process 150 is shown below:

Field	Rec 1	Rec 2	Rec 3
Option Number	90010	90010	90010
Option Description	Super Saver	Super Saver	Super Saver
Report start date	19981220	19981220	19981220
Report end date	20000208	20000208	20000208
Line start date	19981220	19990101	19981220
Line end date	19981231	20000208	20000208
Call Type	102	102	104
Call Type Name	Direct Dialed	Direct Dialed	Network Services
Gross cost of calls (£)	100.00	20.00	50.00
Discount rate (%)	12.00	11.00	5.00
Discount amount (£)	12.00	2.20	2.50

- The hidden records relating to the discounting system added to the electronic bill image by process 270 include a record for each discounting product containing the data used to generate the product's respective time line and a record for each product containing a copy of each segment and linked accumulator(s). For a product such as Friends & Family, the customer's chosen discounted numbers are also stored in a hidden record. Finally, a hidden record containing customer information not held elsewhere in the bill image is added to the bill image. Each type of hidden record has its own unique CTI assigned.

15

Figure 8 is a flow chart of processes performed in disassembling and editing an existing bill image.

A bill image to be edited is disassembled into a number of records, each record representing a particular entry in the bill image. These records can then be edited by a user through a menu interface. The edited records are then used by portions of the bill generation system of

5 Figure 1 to reassemble the bill image reflecting any changes made by the user.

Each line of a bill image selected to be edited is processed to populate the following data structures:

10 Control - holds data that appears on the bill once only including customer address, summary page totals, customer account number and bill serial number.

Details - holds usage records.

Installations - holds details of the installations that appear on a bill. Details include installation class (i.e. payphone, cardphone, business etc) and number of lines for  
15 installation.

Discounting - holds details of all discounting products relating to the account.

Accounting - holds the total charge before discounts displayed on the bill image summary page.

20 The CTI field of each line is cross-referenced with a table giving mappings of CTIs to the relevant data structure(s) in step 800. The mappings associate each CTI with one of the above data structures and also contain rules used to convert the data from the bill image lines to the data structures. The mappings are used to export each line of the bill image to a record in the relevant data structure(s) in steps 810-850.

An example of a record generated in the details data structure from a direct dialled call line in the bill image is as follows:

Field description	Value
Charge Type Identifier	35
Phone number of the installation from which the call is made.	01232 12345
Phone number of the line from which the call is made	01232 12345
Call chargeband (local, national, international or other)	L
Date call was made	1-Nov-1998
Time call was made	18:03
The phone number of the destination being called	01232 84000
The exchange name associated with the destination being called	Belfast
the duration of the call	1:15
the number of call units associated with the call	10

5

The menu interface allows the records of the data structures to be edited in step 860. Using this interface, usage records can be altered, deleted or inserted; details of discounting products and dates on which they are subscribed to can be changed; and details of the customer and installation can be changed. Any change to the charge value of a usage record is reflected by an equivalent change to the total charge held in the accounting data structure.

Once editing is complete, an option in the menu interface allows the user to order the reassembly of the bill image from the data structures in step 870.

Figure 9 is the tree of Figure 2 in which the processes used in reassembling bill images are highlighted.

- 5 For each record of the details data structure, a usage record is created. The CTI and sort key held for each record is copied to the usage record. The usage records are then assembled into a UBD. Any new usage records inserted using the menu interface must have a CTI and sort key assigned by being passed to processes 150-180.
- 10 The data contained in the discounting data structure is used in process 130 to initialise discounting time lines and the total charge value held in the accounting data structure is used to replace the call charge that would be accumulated by process 170. The UBD is then passed into the system at process 190 and a new bill image is generated for the amended records according to processes 200-300.

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**Claims**

1. A method of generating a bill image in a computer-implemented billing system, the billing system being configured to generate bills relating to the use of a telecommunication network, the method including the steps of assigning a charge type identifier (CTI) to each of  
5 a number of usage records and processing each usage record in dependence on its assigned CTI to produce a bill image, the format of the bill image being dependent on the CTIs of the usage records.
2. A method according to claim 1 in which a CTI is assigned to each usage record in  
10 accordance with a set of rules.
3. A method according to claim 1 or 2, in which the processing of each usage record includes the step of assigning a unique sort key to the usage record in dependence on its CTI for defining the relative position of the usage record in the bill image.  
15
4. A method according to claim 2, in which the sort key is generated in dependence on the CTI and a number of fields associated with the usage record.
5. A method according to claim 3 or 4, in which the sort key is generated in accordance  
20 with a set of rules.
6. A method according to any of claims 3 to 5, in which the usage records are subsequently sorted according to their respective sort keys to create a sorted list.

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7. A method according to claim 6, in which the sorted list is processed to generate, when appropriate, and in dependence on the CTIs of the usage records, a number of text inserts to precede or follow a usage record or group of usage records in the bill image.

5 8. A method according to claim 7, in which each CTI is associated with a position in a text map, in which a change in position in the text map triggers the generation of a text insert, and in which generating the text inserts includes the steps of determining the text map position for a usage records CTI, comparing the position with that determined for the previous usage record, and inserting an appropriate text insert if a change in position in the  
10 text map occurs.

9. A method according to claim 8, in which the text map is a tree hierarchically defining the order in which text inserts are to appear in the bill image.

15 10. A method according to claim 9, in which the text map position for each CTI is a leaf node in the tree.

11. A method according to claim 9 or 10, in which each branch between a parent node and a child node in the tree represents text to be inserted in the bill image.

20

12. A method according to any preceding claim, including the step of generating a bill image record in the bill image for a number of the usage records, the format and content of each bill image record being dependent on the CTI of the respective usage record or usage records.



13. A method according to claim 12, in which a bill image record is generated for a plurality of usage records having a common CTL.

5 14. A method according to any preceding claim, in which a number of hidden records are generated in the bill image, the hidden records containing data used to create the bill image.

15. A method according to claim 14, in which the data contained in the hidden records enables the disassembly, modification and reassembly of the bill image to create a fresh bill  
10 image.

16. A method according to any preceding claim, further including the steps of generating a time line over at least a part of which a discount scheme applies, dividing the time line into a number of segments each of which corresponds to a period during which a respective  
15 version of the discount scheme was operative, accumulating charges from usage records for calls made during each segment, calculating an appropriate discount from each of the accumulated charges, generating a usage record for each discount, and subsequently assigning a CTL to each of the generated usage records to create a number of discount usage records.

20

17. A method according to claim 16, in which call usage records are accumulated by call type, the call type being obtained for the call usage records from a mapping of CTL to call type.

18. A memory having a data structure stored therein, the data structure defining an electronic bill image having a number of records, each record having an assigned charge type identifier, in which the format of the bill image is dependent on the charge type identifiers of the respective records, the bill image being created in accordance with the method of any of  
5 claims 1 to 15.

19. A computer implemented billing system including at least one computer readable memory storing computer executable instructions for performing the method of a selected one of claims 1 to 17.

10 20. A system according to claim 19, including a computer readable memory storing a set of rules used to assign a CTI to a usage record.

21. A system according to claim 19 or 20, including a computer readable memory storing  
15 a set of rules used to generate a sort key for a usage record.

22. A computer implemented billing system for generating bills relating to the use of a telecommunications network arranged to perform the following operations:  
assign a charge type identifier (CTI) to each of a number of usage records; and,  
20 process each usage record in dependence on its assigned CTI to produce a bill image, the format of the bill image being dependent on the CTIs of the usage records.

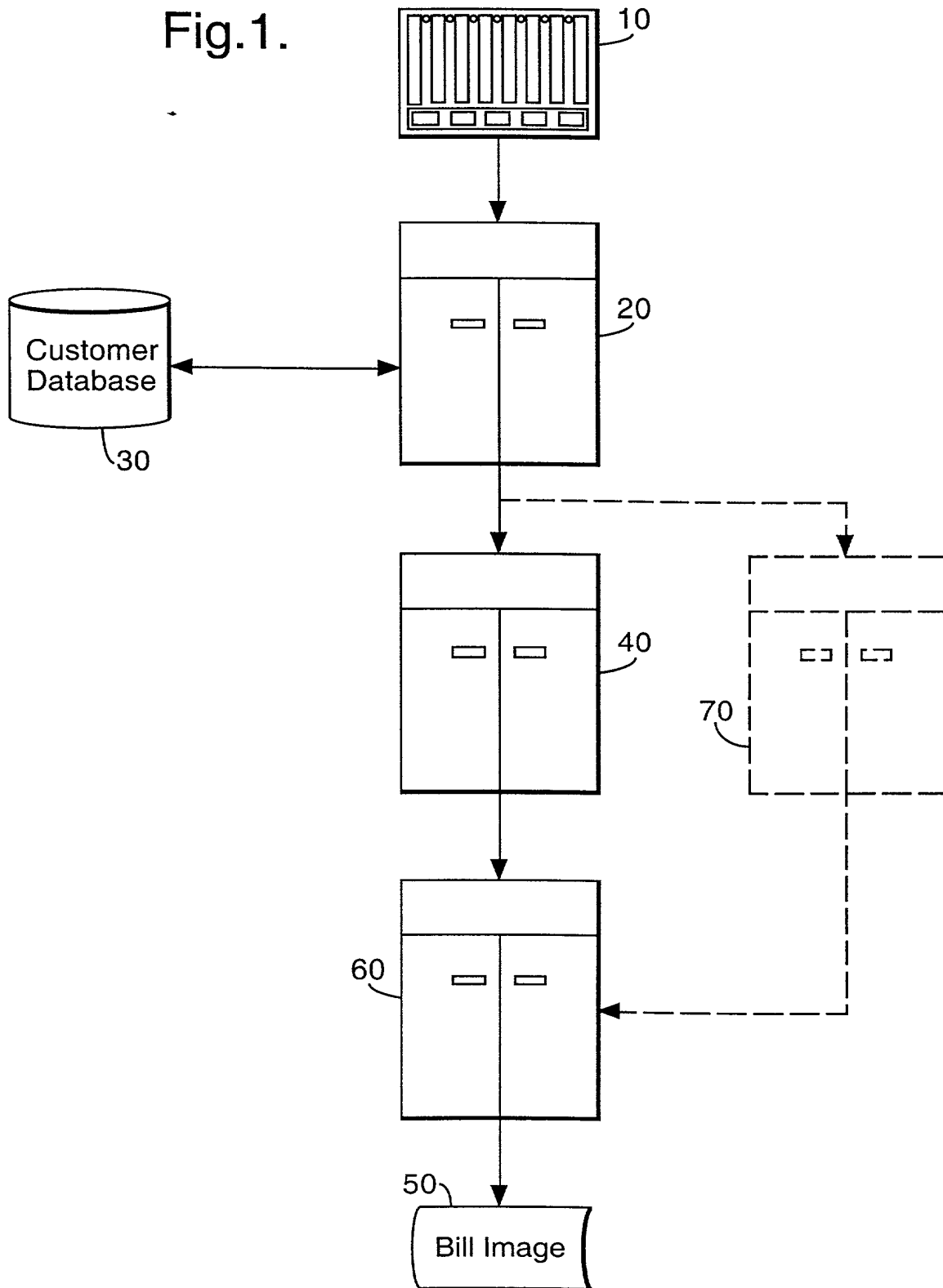
## Abstract

Disclosed is a computer implemented billing system arranged to assign a charge type identifier (CTI) to each of a number of usage records; and to process each usage record in  
5 dependence on its assigned CTI to produce a bill image, the format of the bill image being dependent on the CTIs of the usage records.

Also disclosed is a method of generating a bill image in a computer-implemented billing system, the method comprising the steps of assigning a charge type identifier (CTI) to each of a number of usage records and processing each usage record in dependence on its assigned  
10 CTI to produce a bill image, the format of the bill image being dependent on the CTIs of the usage records.

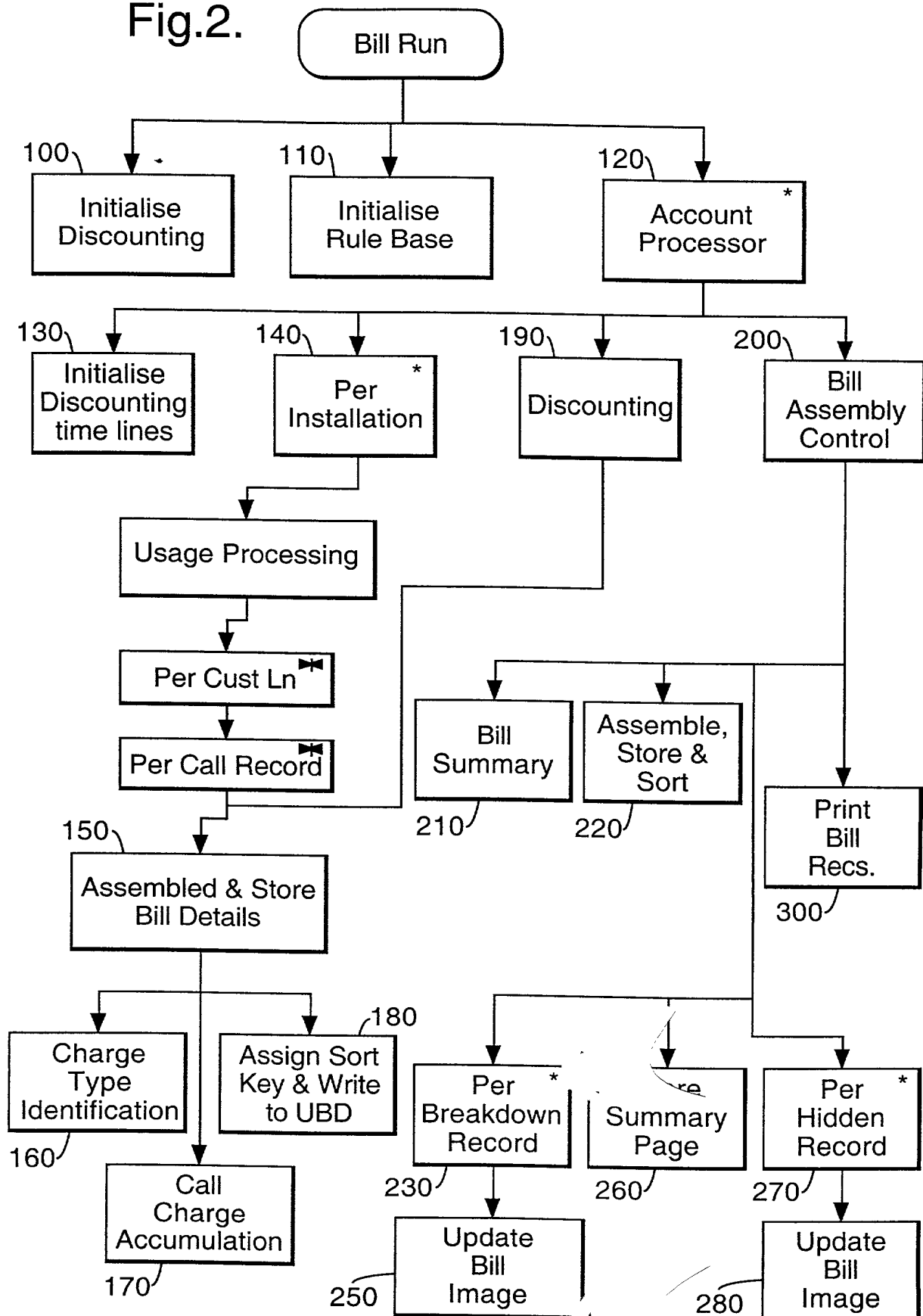
T02230-4624-650

Fig.1.



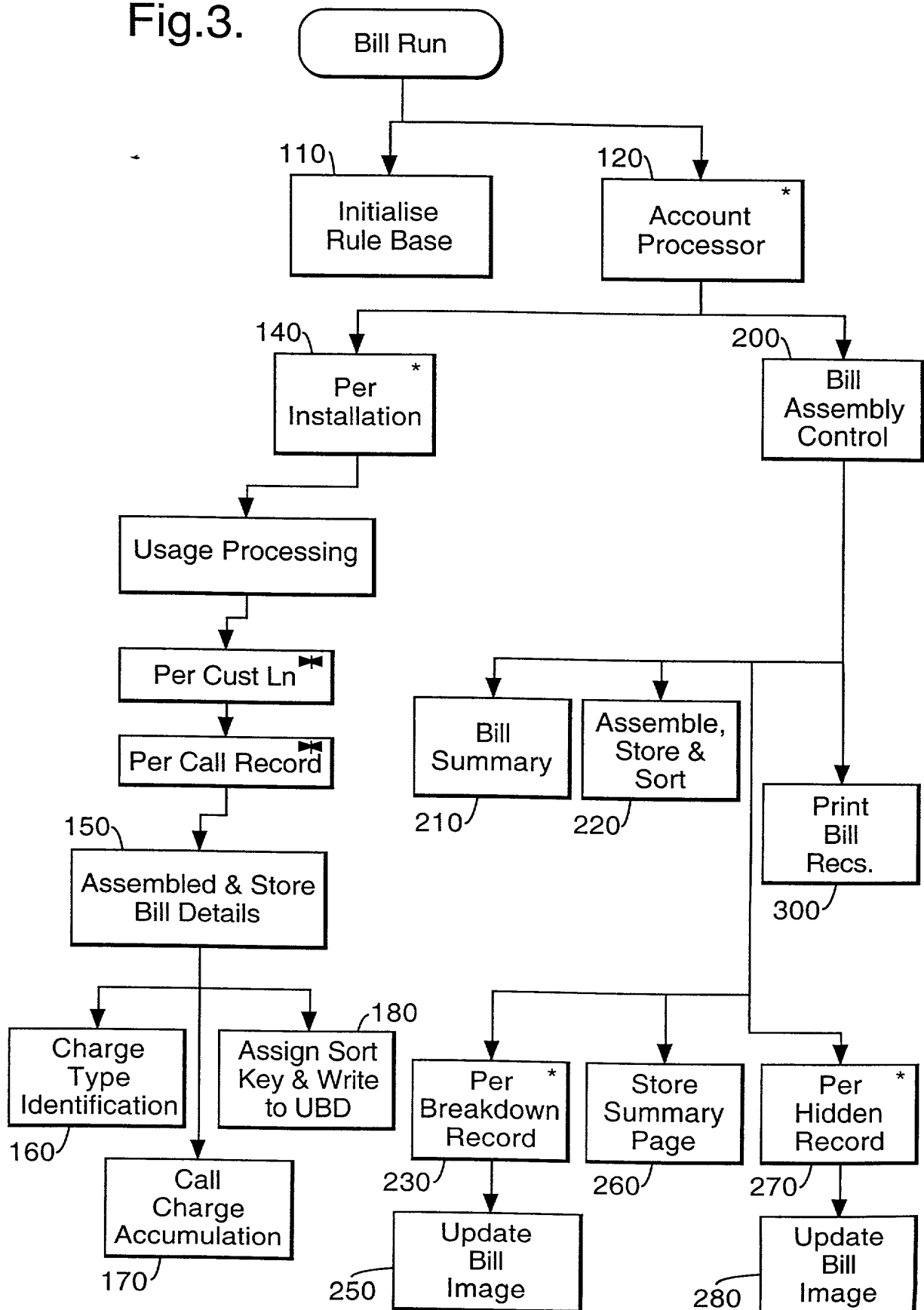
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Fig.2.



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Fig.3.



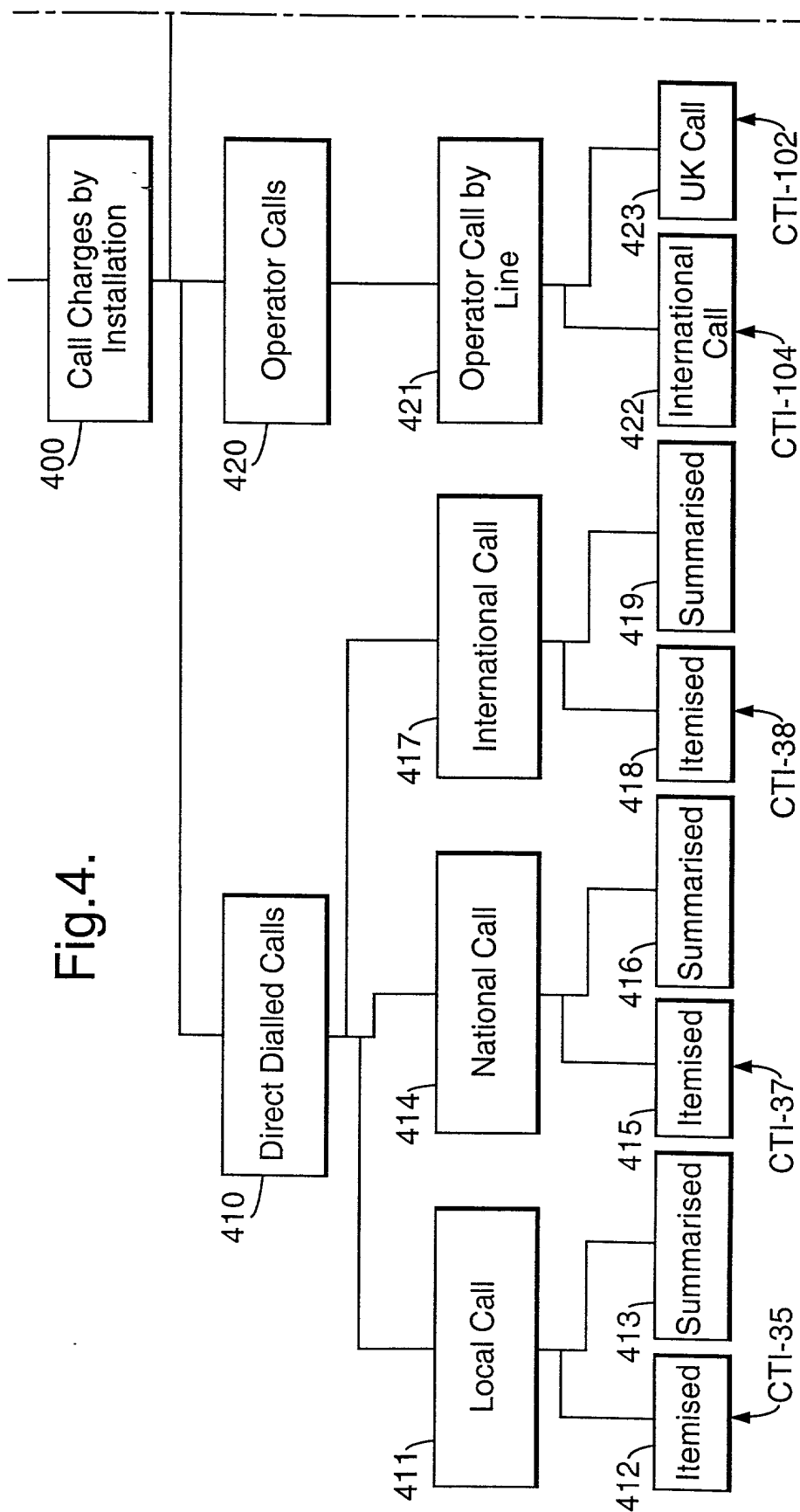


Fig.4 (Cont).

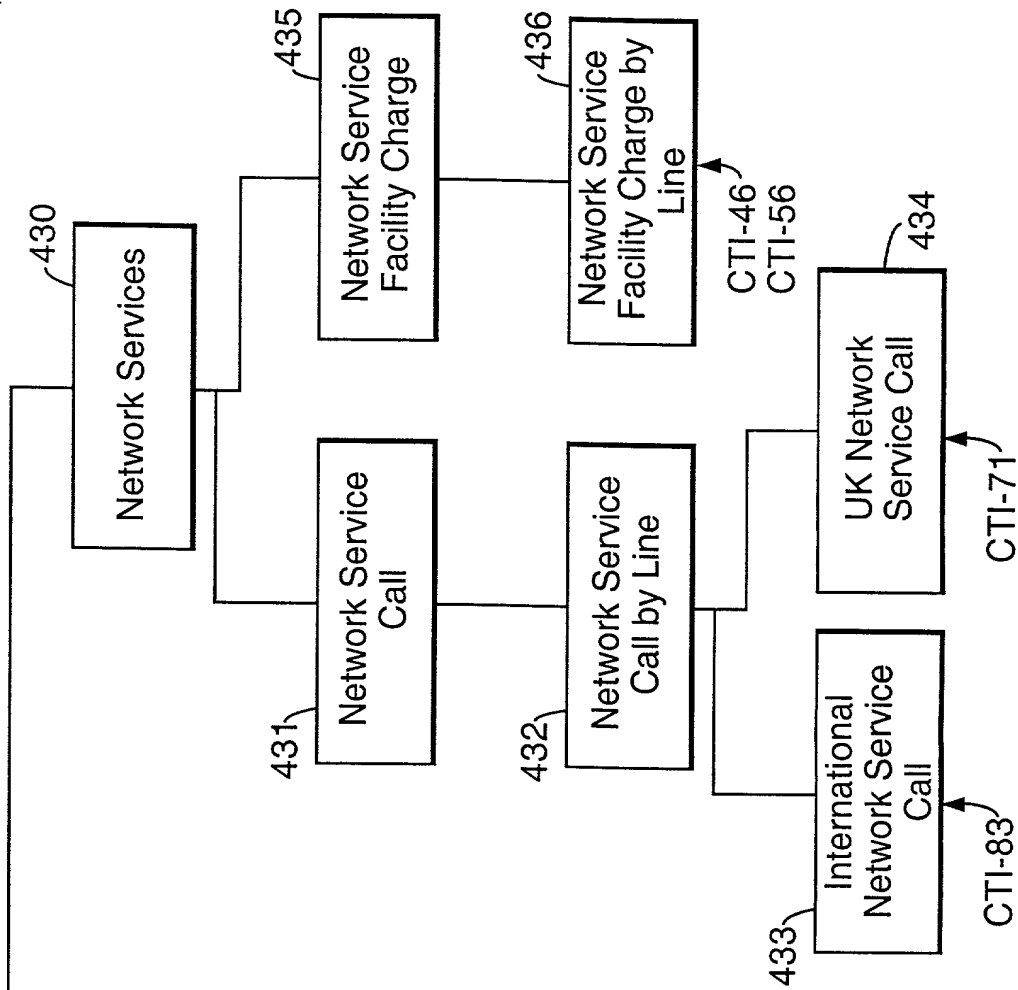




Fig.5a.

Section 400 header  
Section 410 header  
Section 411 header  
Section 412 header  
**Record**

Fig.5b.

Section 400 header  
Section 410 header  
Section 411 header  
Section 412 header  
**Record**  
**Record**

Fig.5c.

Section 400 header  
Section 410 header  
Section 411 header  
Section 412 header  
**Record**  
**Record**  
Section 412 footer  
Section 411 footer  
Section 414 header  
Section 415 header  
**Record**

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Fig.5d.

Section 400 header  
   Section 410 header  
     Section 411 header  
       Section 412 header  
       **Record**  
       **Record**  
       Section 412 footer  
     Section 411 footer  
     Section 414 header  
       Section 415 header  
       **Record**  
       Section 415 footer  
     Section 414 footer  
   Section 410 footer  
   Section 430 header  
     Section 435 header  
       Section 436 header  
       **Record**

Fig.5e.

Section 400 header  
   Section 410 header  
     Section 411 header  
       Section 412 header  
       **Record**  
       **Record**  
       Section 412 footer  
     Section 411 footer  
     Section 414 header  
       Section 415 header  
       **Record**  
       Section 415 footer  
     Section 414 footer  
   Section 410 footer  
   Section 430 header  
     Section 435 header  
       Section 436 header  
       **Record**  
       Section 436 footer  
     Section 435 footer  
   Section 430 footer  
   Section 400 footer

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Fig.6.

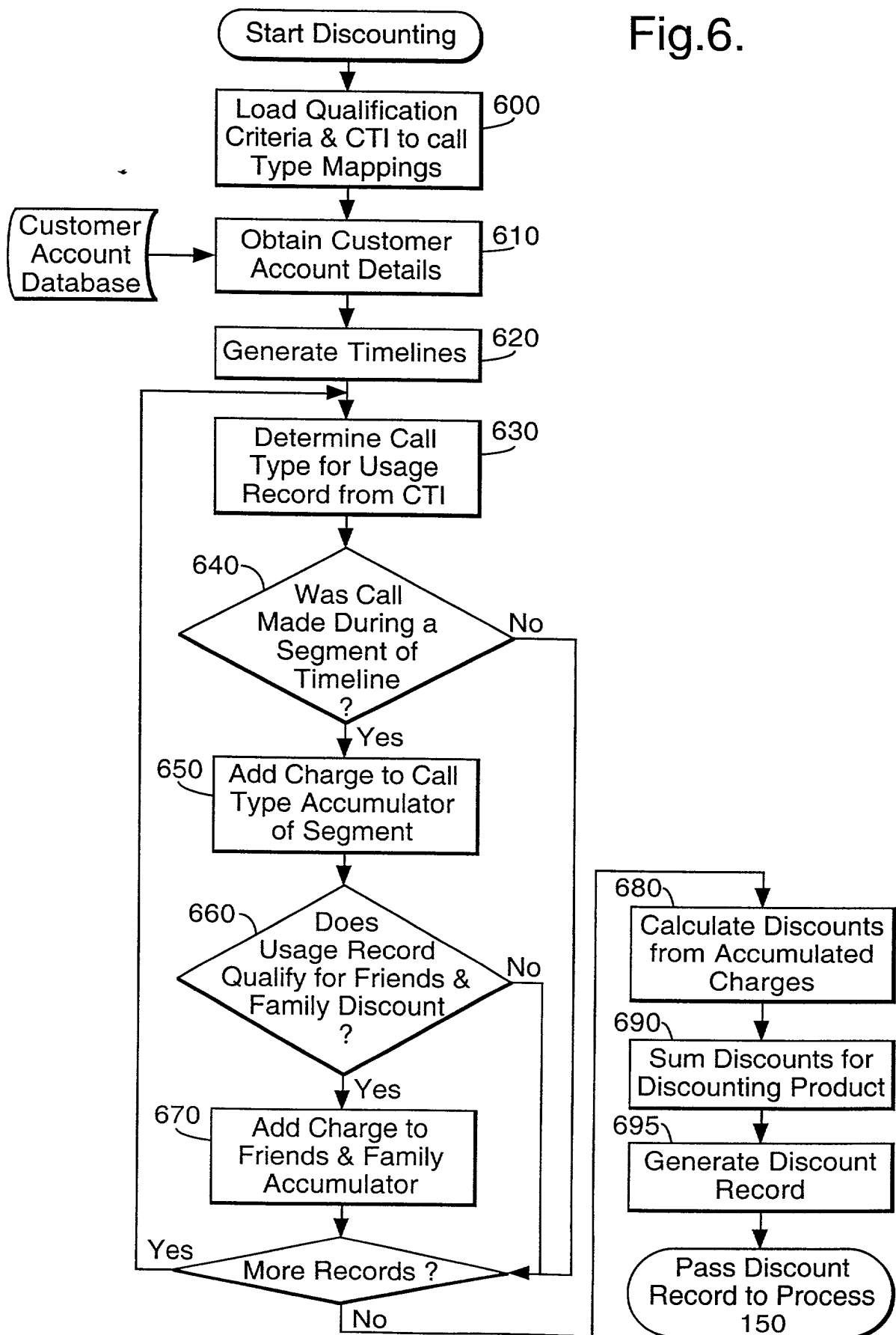


Fig. 7a.

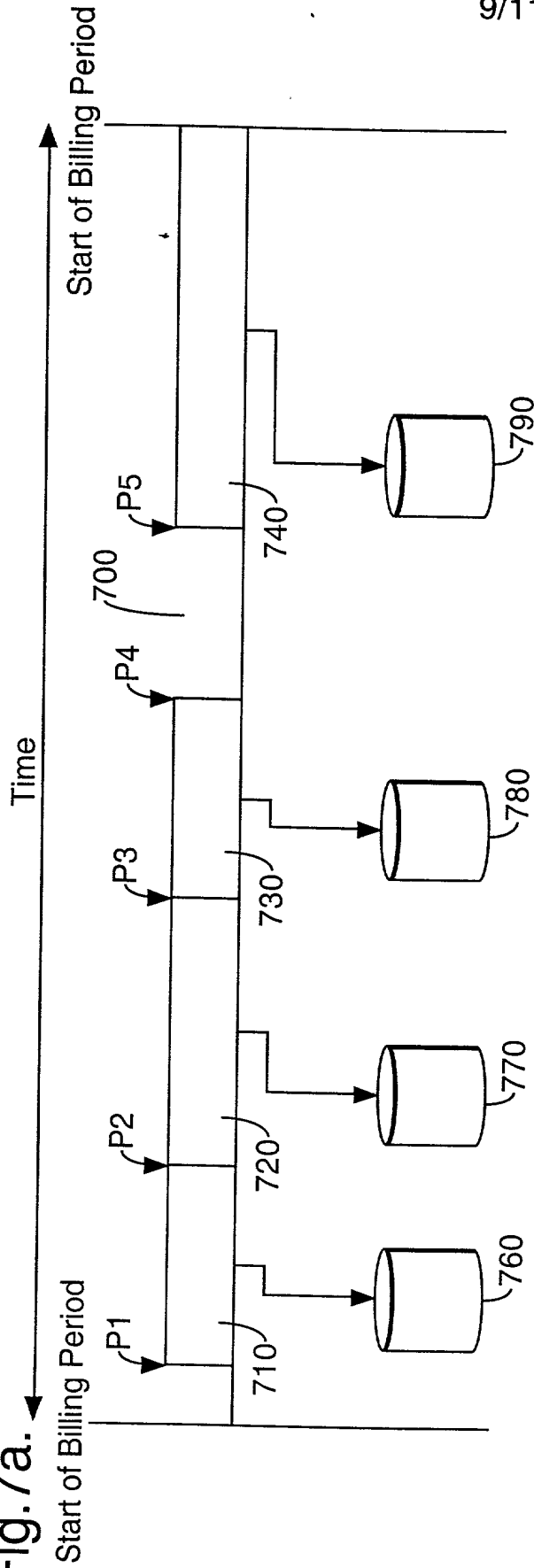
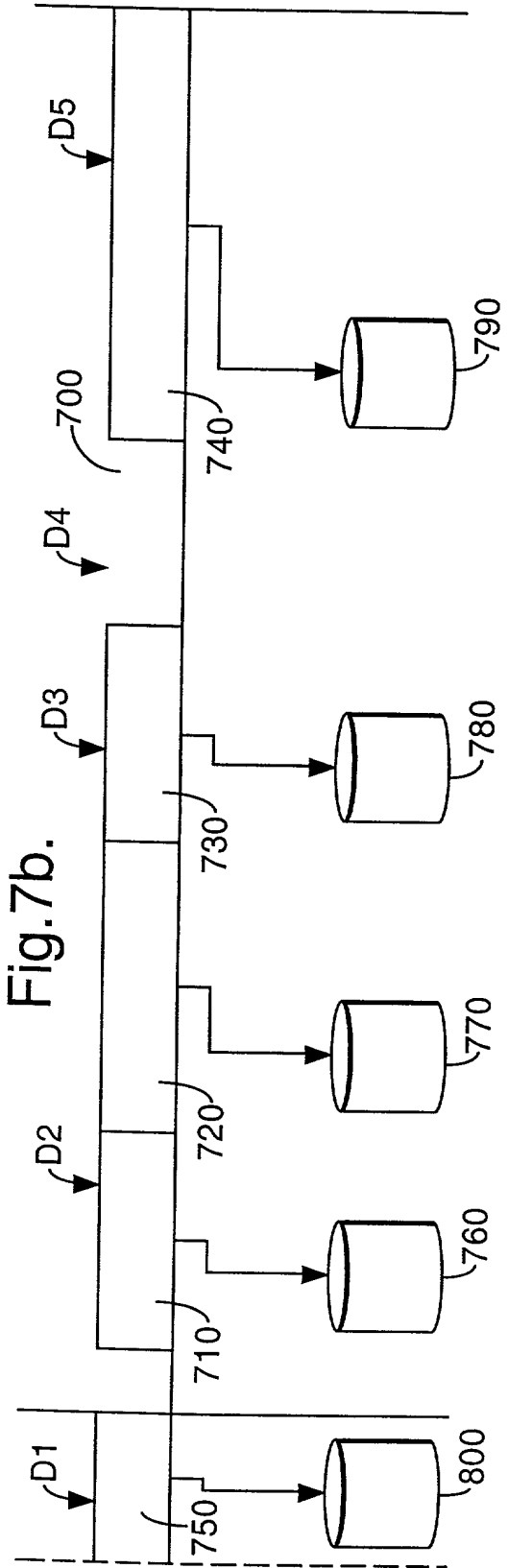
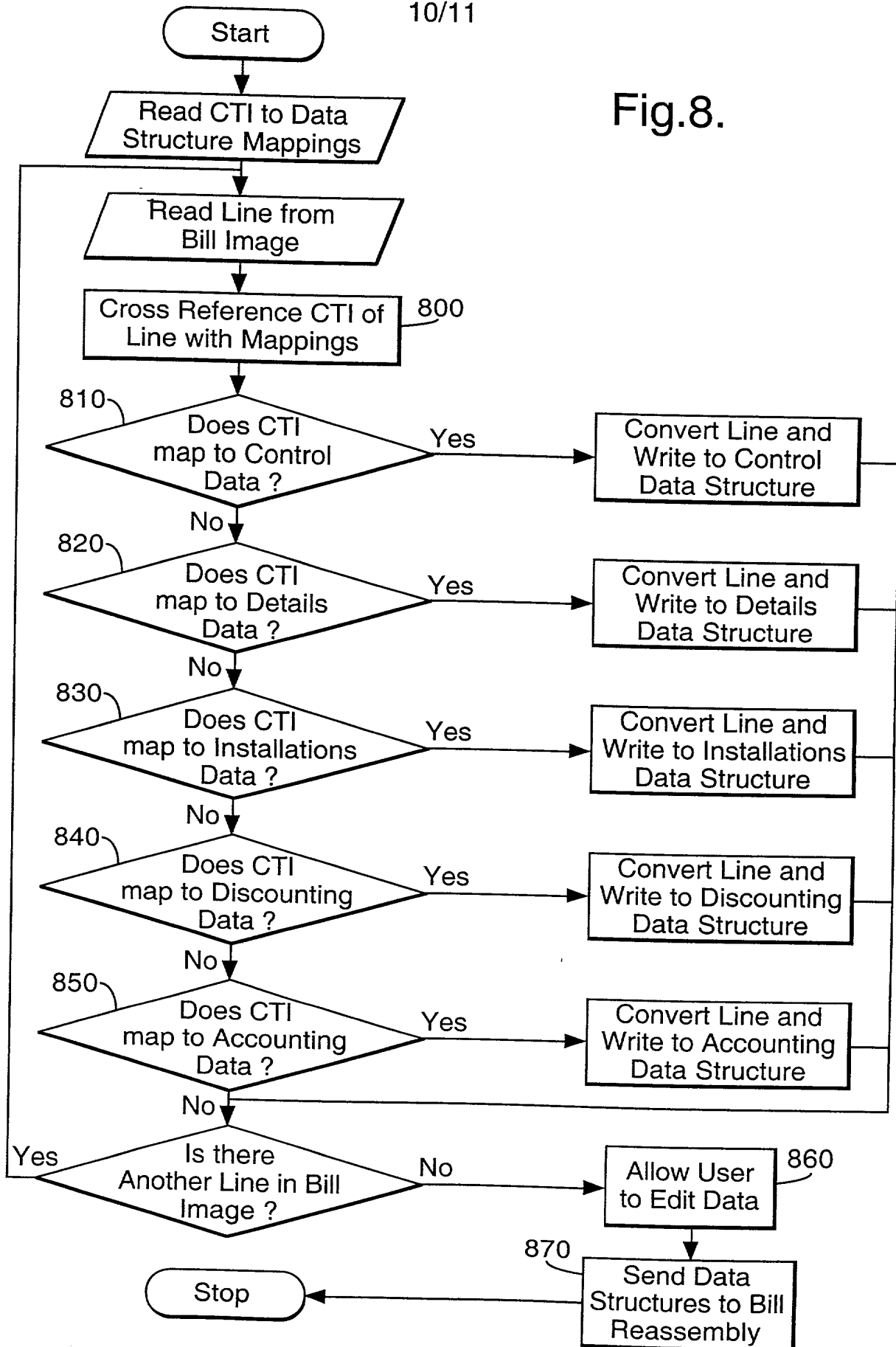


Fig. 7b.



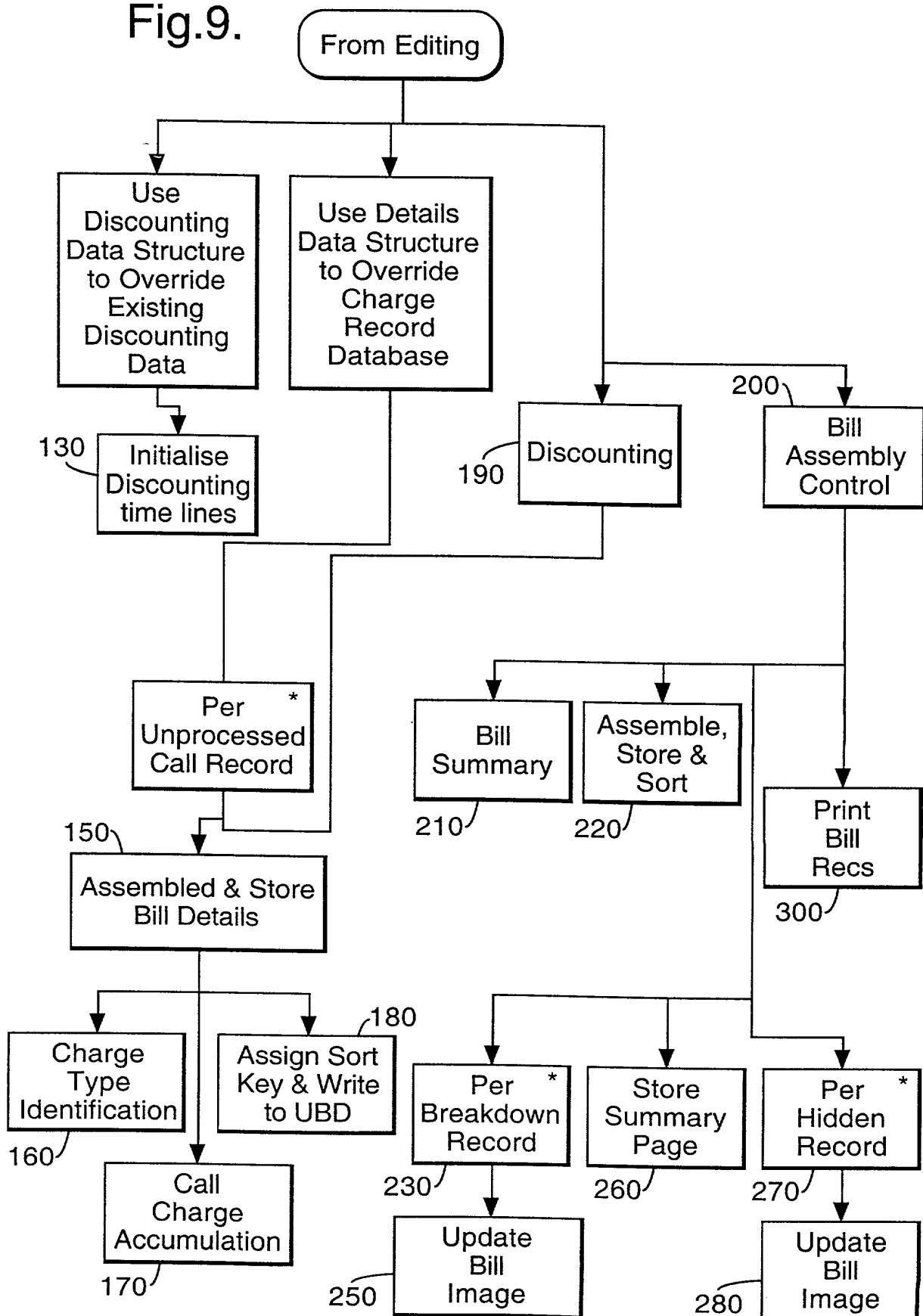
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Fig.8.



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Fig.9.



**RULE 63 (37 C.F.R. 1.63)**  
**DECLARATION AND POWER OF ATTORNEY**  
**FOR PATENT APPLICATION**  
**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

As a below named inventor, I hereby declare that my residence, post office address and citizenship are as stated below next to my name, and I believe I am the original, first and sole inventor (if only one name is listed below) or an original, first and joint inventor (if plural names are listed below) of the subject matter which is claimed and for which a patent is sought on the invention entitled:

**BILL IMAGE GENERATION**

the specification of which (check applicable box(es)):

- ☐ is attached hereto  
☐ Was filed on

As U.S. Application Serial  
No.

(Atty Dkt. No.

☒ Was filed as PCT International application No.

PCT/GB00/01077

on 22 MARCH 2000

and (if applicable to U.S. or PCT application) was amended on

I hereby state that I have reviewed and understand the contents of the above identified specification, including the claims, as amended by any amendment referred to above. I acknowledge the duty to disclose information which is material to the patentability of this application in accordance with 37 C.F.R. 1.56. I hereby claim foreign priority benefits under 35 U.S.C. 119/365 of any foreign application(s) for patent or inventor's certificate listed below and have also identified below any foreign application for patent or inventor's certificate having a filing date before that of the application on which priority is claimed or, if no priority is claimed, before the filing date of this application:

Priority Foreign Application(s):

Application Number  
9906969.2

Country  
GREAT BRITAIN

Day/Month/Year Filed  
25 March 1999

I hereby claim the benefit under 35 U.S.C. §119(e) of any United States provisional application(s) listed below.

Application Number

Date/Month/Year Filed

I hereby claim the benefit under 35 U.S.C. 120/365 of all prior United States and PCT international applications listed above or below and, insofar as the subject matter of each of the claims of this application is not disclosed in such prior applications in the manner provided by the first paragraph of 35 U.S.C. 112, I acknowledge the duty to disclose material information as defined in 37 C.F.R. 1.56 which occurred between the filing date of the prior applications and the national or PCT international filing date of this application:

Prior U.S./PCT Application(s):

Application Serial No.

Day/Month/Year Filed

Status: patented  
pending, abandoned

PENDING

I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code and that such willful false statements may jeopardize the validity of the application or any patent issued thereon. And on behalf of the owner(s) hereof, I hereby appoint **NIXON & VANDERHYE P.C., 1100 North Glebe Rd., 8th Floor, Arlington, VA 22201-4714, telephone number (703) 816-4000 (to whom all communications are to be directed)**, and the following attorneys thereof (of the same address) individually and collectively owner's/owners' attorneys to prosecute this application and to transact all business in the Patent and Trademark Office connected therewith and with the resulting patent: Arthur R. Crawford, 25327; Larry S. Nixon, 25640; Robert A. Vanderhye, 27076; James T. Hosmer, 30184; Robert W. Faris, 31352; Richard G. Besho, 22770; Mark E. Nusbaum, 32348; Michael J. Keenan, 32106; Bryan H. Davidson, 30251; Stanley C. Spooner, 27393; Leonard C. Mitchard, 29009; Duane M. Byers, 33363; Jeffry H. Nelson, 30481; John R. Lastova, 33149; H. Warren Burnam, Jr. 29366; Thomas E. Byrne, 32205; Mary J. Wilson, 32955; J. Scott Davidson, 33489; Alan M. Kagen, 36178; Robert A. Molan, 29834; B. J. Sadoff, 36663; James D. Berquist, 34776; Updeep S. Gill, 37334; Michael J. Shea, 34725; Donald L. Jackson, 41090; Michelle N. Lester, 32331; Frank P. Presta, 19828; Joseph S. Presta, 35329. I also authorize Nixon & Vanderhye to delete any attorney names/numbers no longer with the firm and to act and rely solely on instructions directly communicated from the person, assignee, attorney, firm, or other organization sending instructions to Nixon & Vanderhye on behalf of the owner(s).

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FOR PATENT APPLICATION

Nixon & Vanderhye P.C. (12/95)

Page 2

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

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